

METHOD AND SYSTEM FOR COLLABORATING ADVISORS

Abstract

5 The present invention provides a common collaboration tool to interact, communicate
and serve a client in a coordinated manner in various areas of interest. The present invention
enables a client to authorize selected advisors as well as other participants to view, discuss,
modify and perform other operations in response to the client's request for services. A client
may define the scope of authorization for advisors and/or other participants for security and
confidentiality reasons. Advisors (and/or participants) may access information submitted (or
authorized) by the client to collaborate as a cohesive team in sharing information, devising a
plan, addressing client's concern, drafting (or modifying) a document and performing other
services for the client. The present invention provides a mechanism to implement planning in
an organized and efficient manner, by promoting consistent and accurate collaboration of
15 resources, tools and efforts.

RES 42811v2